



2 MINUTE PEARLS

Cleaning Up Template Lists



- Has your template list become cluttered with templates you never use?
- Would you like to clean out your unused templates so it is easier to access the ones you do use?
- This Pearl will show you how to remove unused templates from both your S/O Template list and Encounter Template list.



Part 1: Removing S/O Templates from My Favorite Folder List

USER, TEST: Military Clinical Desktop - Encounters (Privacy Act of 1974/FOUO) - Training System

Must start with an open encounter...

ALEXANDER, MARIE D 02/202-45-5743 17yo F FM: Col DOB:15 Jan 1990

Date: 03 Apr 2007 1352 EDT Status: In Progress Treatment Facility: CHCSII ITT Facility
Primary Provider: USER, TEST Type: ACUT\$ Clinic: CHCSII ITT Clinic
Patient Status: Outpatient Reason for Appointment:

AutoCite... AutoCites Refreshed by USER, TEST @ 09 Apr 2007 0847 EDT

Problems • NORMAL ROUTINE HISTORY AND PHYSICAL ADOLESCENT (12 - 18)	Allergies No Allergies Found.
---	---

Active Medications
No Active Medications Found.

Screening
Vitals
S/O
A/P
Disposition
AddNote

To access S/O Template Management, you need to first open the S/O module here

Folder List

- Desktop
 - Alert Review
 - Appointments
 - Telephone Consults
 - Search
 - Patient List
 - Consult Log
 - Co-signs
 - New Results
- Reports
- Tools
- Sign Orders
- CHCS-I
- Immunizations Admin
- ALEXANDER, MARIE D
 - Demographics
 - Health History
 - Problems
 - Meds
 - Allergy
 - Wellness
 - Immunizations
 - Vital Signs Review
 - PKC Couplers
 - Readiness
 - Patient Questionnaire
 - Lab
 - Radiology
 - Clinical Notes
 - Previous Encounters
 - Flowsheets
 - Current Encounter
 - Screening
 - Vital Signs Entry
 - S/O**
 - A/P
 - Disposition

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveAs Template Mgt Dx Prompt FindTerm Browse From Here A/P Disposition Sign Cancel Close

ALEXANDER, MARIE D 02/202-45-5743 17yo F FM: Col DOB:15 Jan 1990

Folder List

- Desktop
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- Tools
- Template Manager
- List Management
- Questionnaire Set
- Screening Notifica
- Reminder Mapping
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- Vital Signs Entry
- S/O
- A/P
- Disposition

templatev3--mes <Default>

enc--gen medicin templatev
AIM - ALL-Patient Handou
SD - back low extrem--so-r
back lower extremity--enc-i
back upper extremity--enc--
SD - circumcision note--so--
enc--gen aim template--mes
enc--gen medicin templatev
enc--medicin master coder3

Visit For:
HPI [use for free text]

Options

Important to understand that the templates which display in your drop down menu here are of two types: 1) S/O Templates **and** 2) Encounter Templates

Each of these template types is managed in a different location in AHLTA

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveA Template Mgt Dx Promp

ALEXANDER, MARIE D 02/202-45-5743 17yo F FM: Col DOB:15 Jan 1990

Folder List

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 - A/P
 - Disposition

enc-gen medicin templatev AutoNeg ROS/HPI History FamHist

Entry details for current selection:

The Chief Complaint is:

Duration (numeric) Onset Modifier

Value Unit

HPI Templates (Symptoms)

- The Chief Complaint is:
- Visit For:
- HPI [use for free text]

PMH ROS PE Tests Browse

To access S/O Template Management, click here (Must be in the S/O Module!)

S/O Template Management

The screenshot shows the 'S/O Template Management' window. On the left is a 'Folder List' pane with a tree view of the system's folder structure. The main pane on the right is titled 'S/O Template Management' and contains a list of templates. A red rectangle highlights the 'My Favorites [7]' folder, which is expanded to show a list of templates: 'ALL-Patient Handouts-AF (USER, TEST)', 'back low extrem--so--mes (USER, TEST)', 'circumcision note--so--mes (USER, TEST)', 'gen medcin--so--mes (USER, TEST)', 'mdm terms--so--mes (USER, TEST)', 'NHP-PC-Generic (USER, TEST)', and 'rework DRAFT-EP-Coding-AMEDD (USER, TEST)'. A red arrow points from the text box on the right to this list. Below the list are sections for 'Personal Templates' and 'CHCSII ITT Clinic Templates'. The top of the window has a green header bar with patient information: 'ALEXANDER, MARIE D 02/202-45-5743 17yo F FM: Col DOB:15 Jan 1990'. The top menu bar includes options like Load, New, SaveAs, Edit, Delete, Search, Refresh, Import, Export, Move To Folder, Cancel, and Close.

To view your current S/O Templates, expand the My Favorites folder.

****Templates that are listed in your other folders (i.e. Personal, Clinic) and not in your My Favorites folder do not appear in your drop down list of templates.**

S/O Template Management

The screenshot shows the 'S/O Template Management' window. On the left is a 'Folder List' pane with a tree view containing folders like 'Desktop', 'Alert Review', 'Appointments', 'Telephone Consults', 'Search', 'Patient List', 'Consult Log', 'Co-signs', 'New Results', 'Reports', 'Tools', 'Template Manager', 'List Management', 'Questionnaire Set', 'Screening Notifica', 'Reminder Mapping', 'Sign Orders', 'CHCS-I', 'Immunizations Admin', 'ALEXANDER, MARIE D', 'Demographics', 'Health History', 'Problems', 'Meds', 'Allergy', 'Wellness', 'Immunizations', 'Vital Signs Review', 'PKC Couplers', 'Readiness', 'Patient Questionn', 'Lab', 'Radiology', 'Clinical Notes', 'Previous Encounters', 'Flowsheets', 'Current Encounter', 'Screening', 'Vital Signs Entry', 'S/O', 'A/P', and 'Disposition'. The main pane is titled 'S/O Template Management' and has a search bar 'Name Contains:' with 'FindNow' and 'Folders' buttons. Below is a list of templates grouped into 'My Favorites [8]', 'Personal Templates [12]', and 'CHCSII ITT Clinic Templates'. The 'My Favorites' list includes: 'ALL--Patient Handouts--AF (USER, TEST)', 'back low extrem--so--mes (USER, TEST)', 'circumcision note--so--mes (USER, TEST)', 'EDU--Asthma Education (CHCSII Test Clinic HC2T)', 'gen medicin--so--mes (USER, TEST)', 'mdm terms--so--mes (USER, TEST)', 'NHP-PC-Generic (USER, TEST)', and 'rework DRAFT--FP--Coding--AMEDD (USER, TEST)'. A right-click context menu is open over 'EDU--Asthma Education', showing options: 'New', 'Edit', 'Delete', 'Load', 'Move To Folder', and 'Remove from Favorites' (highlighted in blue).

To remove a template from My Favorites folder:

- 1) Left Click on template name to highlight
- 2) Right Click and select Remove from Favorites (this does not delete a template, it simply takes it off of your favorite list so it will no longer appear in your drop down menu).

****Repeat steps as necessary for remaining S/O Templates**



Part 2: Removing Encounter Templates from My Favorite Folder List

Do Not Need An Open Encounter

4/FOUO) - Training System

Check-In Check-Out Ins. Form Undo Cancel Close Today+Incomplete

SUAREZ, EDUARDO A 20/454-72-3217 45yo M LCDR DOB:10 Sep 1961

Folder List

Change Selections ... My Appointments in This Clinic for Today plus Incomplete.

Appt. Date/Time	Patient	Status	Reason for Visit	FMP/SSN	CheckIn Time	Type	Classification	Home Phone	Wc
05 Mar 2007 1030	BERG, OLAF V	InProgress	Cold and Flu	20/245638943	11 Mar 2007 2107	ACUTE APPT	Outpatient	123 7777777	
05 Mar 2007 1100	WILLIAMS, CLAYTON U	InProgress	headache/physical	20/967628867	14 Mar 2007 1255	ROUTINE	Outpatient	123 3233000	
20 Mar 2007 1703	SUAREZ, EDUARDO A	InProgress		20/454723217	20 Mar 2007 1703	ROUTINE	Outpatient	123 8888888	12
29 Mar 2007 1347	ALEXANDER, MARIE D	InProgress		02/202455743	29 Mar 2007 1347	ACUTE APPT	Outpatient	123 3333333	
29 Mar 2007 1408	ALEXANDER, MARIE D	InProgress		02/202455743	29 Mar 2007 1409	ACUTE APPT	Outpatient	123 3333333	
29 Mar 2007 1415	WILLIAMS, CLAYTON U	CheckedIn		20/967628867	29 Mar 2007 1415	ACUTE APPT	Outpatient	123 3233000	
03 Apr 2007 0934	WILLIAMS, CLAYTON U	CheckedIn	Abd Pain, 65 yo M, 98.7, 128/95, hr 75, rr 12, 98%	20/967628867	03 Apr 2007 0934	ACUTE APPT	Outpatient	123 3233000	
03 Apr 2007 1352	BERG, OLAF V	InProgress		20/245638943	03 Apr 2007 1352	ACUTE APPT	Outpatient	123 7777777	
03 Apr 2007 1352	ALEXANDER, MARIE D	InProgress		02/202455743	03 Apr 2007 1352	ACUTE APPT	Outpatient	123 3333333	
26 Apr 2007 0252	ALEXANDER, MARIE D	InProgress		02/202455743	26 Apr 2007 0252	ACUTE APPT	Outpatient	123 3333333	

Tools

Template Management

Questionnaire Setup

Screening Notifications

Reminder Mapping

Sign Orders

CHCS-I

Immunizations Admin

SUAREZ, EDUARDO A

Demographics

Health History

Problems

Meds

Allergy

Wellness

Immunizations

Vital Signs Review

PKC Couplers

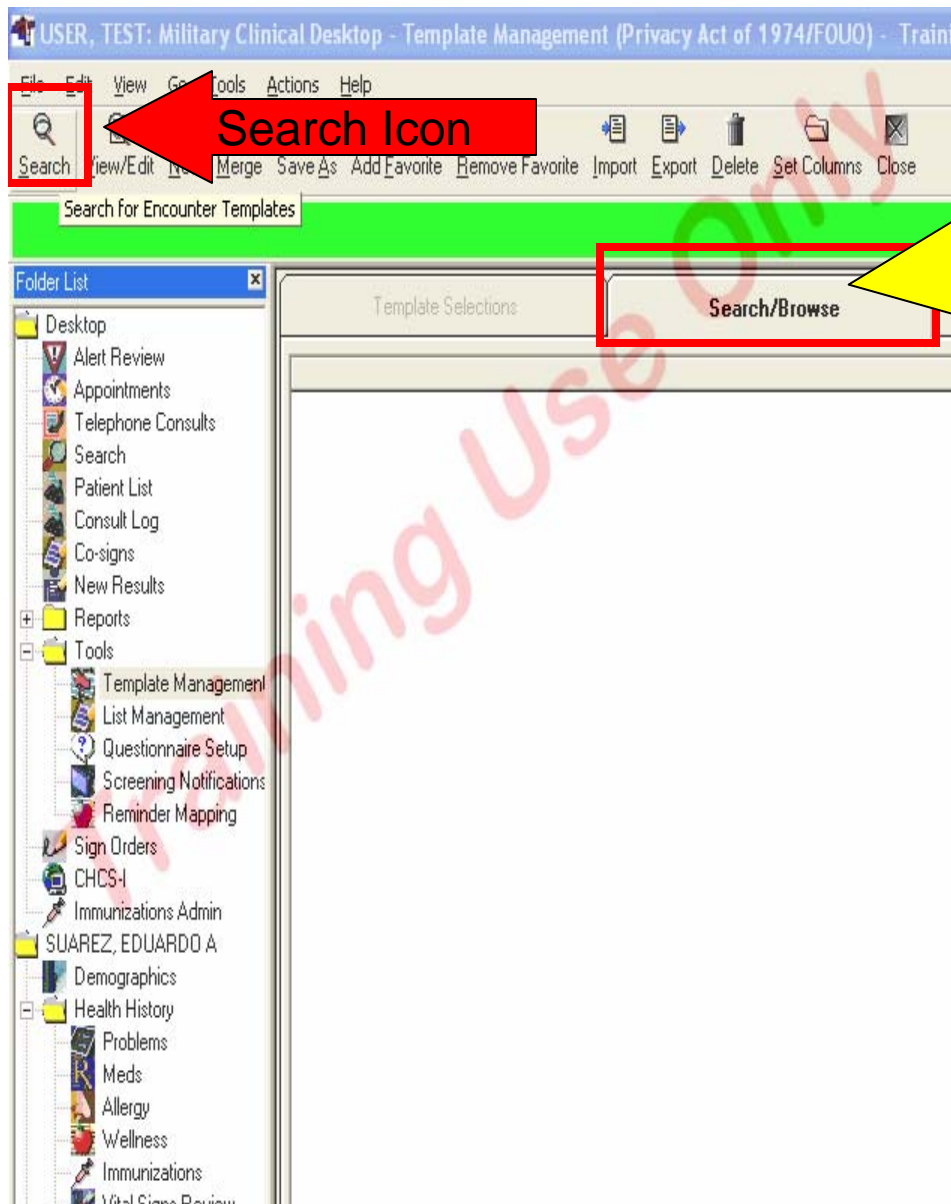
Readiness

Patient Questionnaires

Lab

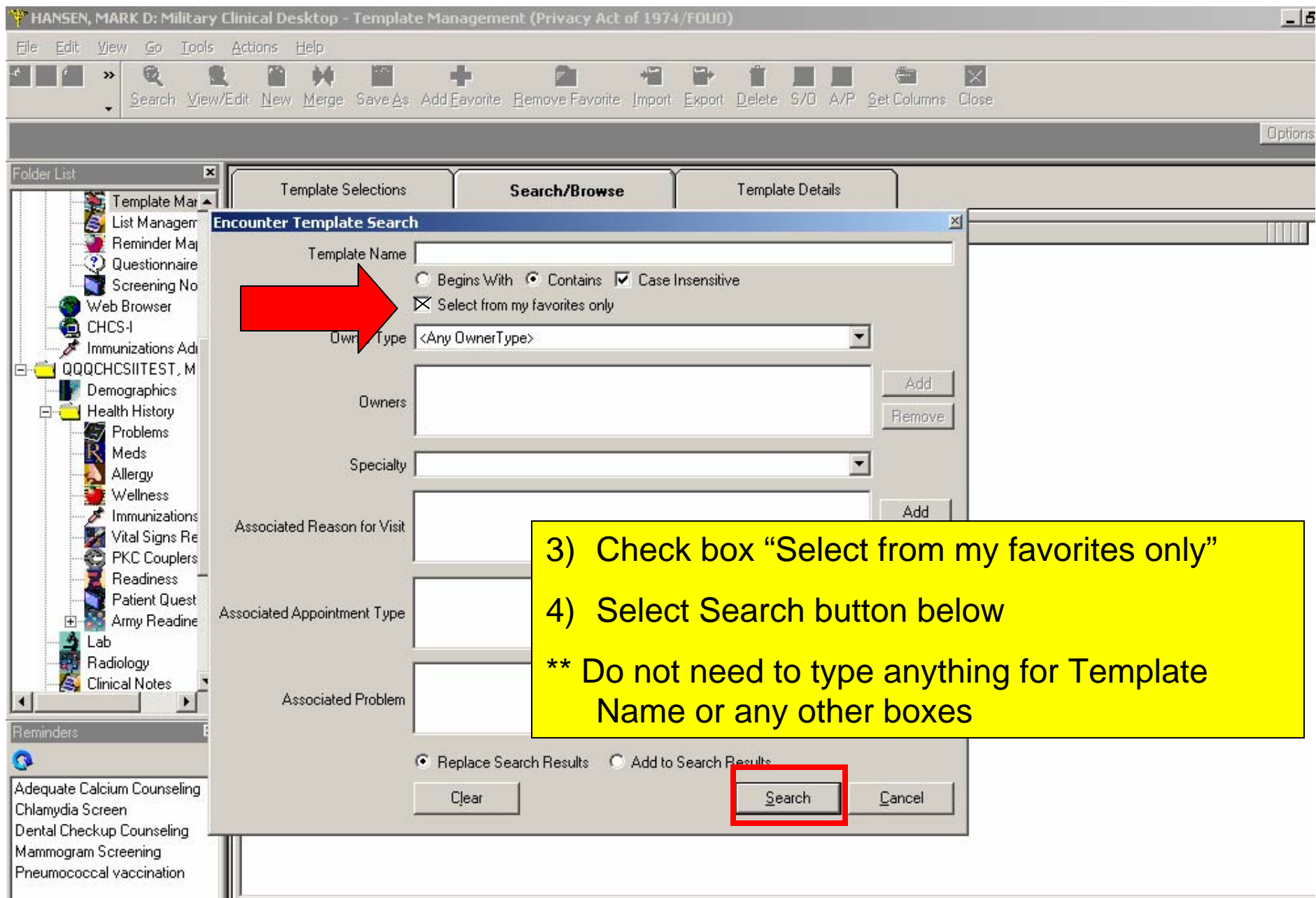
To Access Encounter Template Management:

- Open Tools Folder
- Select Template Management



To Remove Templates from My Favorite *Encounter* Templates:

- 1) Make sure you are in Search/Browse Tab of Template Management
- 2) Select Search Icon (upper left corner of tool bar)



HANSEN, MARK D: Military Clinical Desktop - Template Management (Privacy Act of 1974/FOUO)

File Edit View Go Tools Actions Help

Search View/Edit New Merge Save As Add Favorite Remove Favorite Import Export Delete S/D A/P Set Columns Close

Remove Favorite Remove Encounter Template from Favorites

Options

Folder List

- Template Mar
- List Manager
- Reminder Ma
- Questionnaire
- Screening No
- Web Browser
- CHCS-I
- Immunizations Ad
- QQQCHCSITEST, M
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Re
- PKC Couplers
- Readiness
- Patient Quest
- Army Readine
- Lab
- Radiology
- Clinical Notes

Reminders

- Adequate Calcium Counseling
- Chlamydia Screen
- Dental Checkup Counseling
- Mammogram Screening
- Pneumococcal vaccination

Template Selections Search/Browse Template Details

Shared	Favorite	Template Name	ID	Scope	Owner
Yes	Yes	1Ageneric-FMSBAMC	937813	User	STOTTS, MARY A
No	Yes	Default (DEFAULT TEMPLATE)	1117692	User	HANSEN, MARK D
Yes	Yes	DEFAULT PEDS BAMC	1123187	User	HANSEN, MARK D
Yes	Yes	EM codes	1136079	Clinic	OPHTHALMOLOGY,BAMC BO BBDA
Yes	Yes	ENC--14-23 wks---mbf	999861	Clinic	OBSTETRICS HMO, WHMC BCCA
Yes	Yes	ENC--24-35 wks---mbf	999862	Clinic	OBSTETRICS HMO, WHMC BCCA
Yes	Yes	ENC--36-41 wks---mbf	999866	Clinic	OBSTETRICS HMO, WHMC BCCA
Yes	Yes	ENC--COB---mbf	1010279	Clinic	OBSTETRICS HMO, WHMC BCCA
Yes	Yes	ENC--NOB Visit---mbf	1015559	User	ALVIAR, AIMEE L
Yes	Yes	ENC--NOB---mbf	1031802	Clinic	OBSTETRICS HMO, WHMC BCCA
Yes	Yes	Flat Feet - MDH	1107419	User	HANSEN, MARK D
Yes	Yes	FP--General-AIM--AMEDD	1047627	User	DE LA PENA, JOSE C
Yes	Yes	OB Summary testing	1032899	User	HANSEN, MARK D
No	Yes	orders	1036763	User	HANSEN, MARK D
Yes	Yes	ORS--DM OB---mbf	999868	Clinic	OBSTETRICS HMO, WHMC BCCA
Yes	Yes	ORTHO--General-AIM--AMEDD	910609	Clinic	TMC KAHC FL BHA
Yes	Yes	PE-COM--BAMC	301694	User	GEORGEDAVION, SIMIRA

To remove templates from My Favorite list:

- 1) Left click on single template name or hold down the CTRL button and select multiple template names
- 2) Select Remove Favorite icon on top tool bar
- 3) You will need to exit Template Management before changes take effect



For More Information...



- AMEDD AHLTA Homepage
 - <https://www.us.army.mil/suite/page/406> (AKO password required)
- AHLTA Video Tutorials
 - <http://www-nmcp.mar.med.navy.mil/AHLTA/AHLTA%20Training%20Tools/index.html>

I would appreciate any feedback or suggestions you have for future ***AHLTA 2 Minute Pearls***. Please contact me at the following:

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